UpCity integrates product and finance data with CRM to automate prospecting, doubling MQLs

The Client

UpCity is an online marketplace that creates and empowers relationships between businesses and service providers through online reviews, recommendations, and verification. They are dedicated to helping their partners in their marketplace grow their businesses by providing support and help to build their online recommendability, and help SMBs navigate the web of service providers they could work with to grow their business.

The Problem

UpCity was replatforming their product, with a focus on creating an inbound experience faced with the constraints placed on their sales team's effectiveness due to COVID-19. They needed to drive product qualified leads (PQLs) in a time when other marketing channels weren't going to be as effective.

The Solution

A8 built out a custom Ledger object in Salesforce which stores all data about a customer's relationship with UpCity, what products they're subscribed to, how long they've been a customer, and what their interaction with the product has been. This was then integrated into the Opportunity process within Salesforce and linked to Accounts to give a single source of truth for customer data.

The Outcome

This project enabled UpCity to track what products a customer was activated for, and in combination with product usage data, UpCity could trigger automated sales activities towards customers and freemium users to drive upsell and cross-sell. UpCity was also able to track the entire customer journey from first touch through to end sale, giving them more accurate representation of their marketing performance and impact on revenue.

Why Aptitude 8?

UpCity chose us because they needed a partner who had vast experience in areas beyond just sales or customer service. Before turning to us, UpCity was stuck producing exports

from the product and had difficulty connecting this data to the relationship information locked in the CRM. UpCity knew they needed a partner who not only could bring technical Salesforce skills to bear, but that could help look at their internal stack as a product designed to drive outcomes for their sales and marketing teams.